

STATE OF CALIFORNIA
Budget Change Proposal - Cover Sheet
DF-46 (REV 08/15)

Fiscal Year 2016-17	Business Unit 0530	Department Health and Human Services Agency	Priority No. 1
Budget Request Name 0530-005-BCP-BR-2016-GB		Program 0290- Office of Systems Integration	Subprogram

Budget Request Description
eWIC MIS Project

Budget Request Summary

The Office of Systems Integration (OSI) is requesting \$4.1 million in Fiscal Year 2016-17 expenditure authority and 19.5 permanent positions for the new Women, Infants and Children (WIC) Management Information Systems (eWIC MIS) Project. The California Department of Public Health (CDPH), as the single State entity responsible for the federally-funded WIC Program, is proposing to contract with the OSI to assume management of the eWIC MIS Project including completing the system acquisition and managing the project through successful completion of statewide implementation. CDPH will fund the project with 100% federal funding and is submitting a separate BCP to request the necessary appropriation authority.

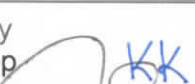

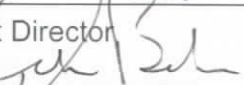
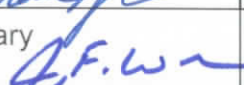
In addition, because completion of the eWIC MIS project is a critical component of meeting the federal mandate for California to issue WIC food benefits via Electronic Benefit Transfer (EBT) by October 1, 2020, CDPH intends to redirect some existing positions and funding to OSI in the Current Year (CY) to begin their work.

Requires Legislation <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Code Section(s) to be Added/Amended/Repealed	
Does this BCP contain information technology (IT) components? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If yes, departmental Chief Information Officer must sign.	Department CIO Dave Patch 	Date 11-23-15

For IT requests, specify the date a Special Project Report (SPR) or Feasibility Study Report (FSR) was approved by the Department of Technology, or previously by the Department of Finance.

☒ FSR ☐ SPR Project No. EBT 4265-019; eWIC MIS 4265-028 Date: EBT 11/21/2014; eWIC MIS 10/28/2014

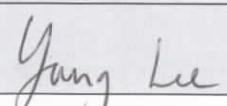
If proposal affects another department, does other department concur with proposal? ☒ Yes ☐ No
Attach comments of affected department, signed and dated by the department director or designee.

Prepared By Kurtis Knapp 	Date 11/16/15	Reviewed By Matt Schueller 	Date 11/24/15
Department Director John Boule 	Date 12/23/15	Agency Secretary Diana Dooley 	Date 12/28/15

Department of Finance Use Only

Additional Review: ☐ Capital Outlay ☐ ITCU ☐ FSCU ☐ OSAE ☐ CALSTARS ☐ Dept. of Technology

BCP Type: ☐ Policy ☒ Workload Budget per Government Code 13308.05

PPBA 	Date submitted to the Legislature 1-7-16
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BCP Fiscal Detail Sheet

BCP Title: eWIC/Management Information System (MIS) Project

DP Name: 0530-005-BCP-DP-2016-GB

Budget Request Summary

	FY16					
	CY	BY	BY+1	BY+2	BY+3	BY+4
Positions - Permanent	0.0	19.5	19.5	19.5	19.5	19.5
Total Positions	0.0	19.5	19.5	19.5	19.5	19.5
Salaries and Wages						
Earnings - Permanent	0	1,529	1,529	1,529	1,529	1,146
Earnings - Temporary Help	0	40	40	0	0	0
Total Salaries and Wages	\$0	\$1,569	\$1,569	\$1,529	\$1,529	\$1,146
Total Staff Benefits	0	765	765	746	746	559
Total Personal Services	\$0	\$2,334	\$2,334	\$2,275	\$2,275	\$1,705
Operating Expenses and Equipment						
5301 - General Expense	0	202	202	197	197	148
5302 - Printing	0	5	5	5	5	4
5304 - Communications	0	32	32	31	31	24
5320 - Travel: In-State	0	33	33	32	32	24
5322 - Training	0	20	20	20	20	14
5324 - Facilities Operation	0	450	150	150	150	113
5340 - Consulting and Professional Services -	0	1,025	1,817	4,507	3,754	2,368
Total Operating Expenses and Equipment	\$0	\$1,767	\$2,259	\$4,942	\$4,189	\$2,695
Total Budget Request	\$0	\$4,101	\$4,593	\$7,217	\$6,464	\$4,400
Fund Summary						
Fund Source - State Operations						
9745 - California Health and Human Services	0	4,101	4,593	7,217	6,464	4,400
Total State Operations Expenditures	\$0	\$4,101	\$4,593	\$7,217	\$6,464	\$4,400
Total All Funds	\$0	\$4,101	\$4,593	\$7,217	\$6,464	\$4,400
Program Summary						
Program Funding						
0290 - Office of Systems Integration	0	4,101	4,593	7,217	6,464	4,400
Total All Programs	\$0	\$4,101	\$4,593	\$7,217	\$6,464	\$4,400

Personal Services Details

Positions	Salary Information			CY	BY	BY+1	BY+2	BY+3	BY+4
	Min	Mid	Max						
1139 - Office Techn (Typing) (Eff. 07-01-2016)	\$2,809	\$3,162	\$3,515	0.0	1.0	1.0	1.0	1.0	1.0
1312 - Staff Info Sys Analyst (Spec) (Eff. 07-01-	\$5,295	\$6,129	\$6,963	0.0	2.0	2.0	2.0	2.0	2.0
1337 - Sr Info Sys Analyst (Spec) (Eff. 07-01-	\$5,824	\$6,740	\$7,655	0.0	5.0	5.0	5.0	5.0	5.0
1367 - Sys Software Spec III (Tech) (Eff. 07-01-	\$6,388	\$7,392	\$8,396	0.0	1.0	1.0	1.0	1.0	1.0
1373 - Sys Software Spec II (Tech) (Eff. 07-01-	\$5,814	\$6,728	\$7,642	0.0	2.0	2.0	2.0	2.0	2.0
1384 - Dp Mgr II (Eff. 07-01-2016)	\$6,115	\$7,077	\$8,038	0.0	1.0	1.0	1.0	1.0	1.0
1387 - Dp Mgr IV (Eff. 07-01-2016)	\$8,182	\$8,969	\$9,756	0.0	1.0	1.0	1.0	1.0	1.0
1393 - Dp Mgr III (Eff. 07-01-2016)	\$7,442	\$8,157	\$8,872	0.0	2.0	2.0	2.0	2.0	2.0
5142 - Assoc Pers Analyst (Eff. 07-01-2016)	\$4,600	\$5,179	\$5,758	0.0	0.5	0.5	0.5	0.5	0.5
5157 - Staff Svcs Analyst (Gen) (Eff. 07-01-2016)	\$2,945	\$3,867	\$4,788	0.0	1.0	1.0	1.0	1.0	1.0
5284 - Assoc Budget Analyst (Eff. 07-01-2016)	\$4,600	\$5,179	\$5,758	0.0	0.5	0.5	0.5	0.5	0.5
5393 - Assoc Govtl Program Analyst (Eff. 07-01-	\$4,600	\$5,179	\$5,758	0.0	1.0	1.0	1.0	1.0	1.0
5795 - Atty III (Eff. 07-01-2016)	\$8,032	\$9,169	\$10,305	0.0	0.5	0.5	0.5	0.5	0.5
8336 - Hlth Program Spec II (Eff. 07-01-2016)	\$5,550	\$6,249	\$6,947	0.0	1.0	1.0	1.0	1.0	1.0
TH00 - Temporary Help (Eff. 07-01-2016)				0.0	0.0	0.0	0.0	0.0	0.0
Total Positions				0.0	19.5	19.5	19.5	19.5	19.5
Salaries and Wages	CY	BY	BY+1	BY+2	BY+3	BY+4			
1139 - Office Techn (Typing) (Eff. 07-01-2016)	0	38	38	38	38	28			
1312 - Staff Info Sys Analyst (Spec) (Eff. 07-01-	0	147	147	147	147	110			
1337 - Sr Info Sys Analyst (Spec) (Eff. 07-01-	0	405	405	405	405	303			
1367 - Sys Software Spec III (Tech) (Eff. 07-01-	0	89	89	89	89	67			
1373 - Sys Software Spec II (Tech) (Eff. 07-01-	0	161	161	161	161	121			
1384 - Dp Mgr II (Eff. 07-01-2016)	0	85	85	85	85	64			
1387 - Dp Mgr IV (Eff. 07-01-2016)	0	108	108	108	108	81			
1393 - Dp Mgr III (Eff. 07-01-2016)	0	196	196	196	196	147			
5142 - Assoc Pers Analyst (Eff. 07-01-2016)	0	31	31	31	31	23			
5157 - Staff Svcs Analyst (Gen) (Eff. 07-01-2016)	0	46	46	46	46	35			
5284 - Assoc Budget Analyst (Eff. 07-01-2016)	0	31	31	31	31	23			
5393 - Assoc Govtl Program Analyst (Eff. 07-01-	0	62	62	62	62	47			
5795 - Atty III (Eff. 07-01-2016)	0	55	55	55	55	41			
8336 - Hlth Program Spec II (Eff. 07-01-2016)	0	75	75	75	75	56			
TH00 - Temporary Help (Eff. 07-01-2016)	0	40	40	0	0	0			
Total Salaries and Wages	\$0	\$1,569	\$1,569	\$1,529	\$1,529	\$1,146			
Staff Benefits									
5150350 - Health Insurance	0	362	362	353	353	265			
5150600 - Retirement - General	0	403	403	393	393	294			
Total Staff Benefits	\$0	\$765	\$765	\$746	\$746	\$559			
Total Personal Services	\$0	\$2,334	\$2,334	\$2,275	\$2,275	\$1,705			

A. Budget Request Summary

This Budget Change Proposal (BCP) requests \$4,100,976 in Fiscal Year 2016-17 expenditure authority and 19.5 permanent positions for the Office of Systems Integration (OSI).

The current federal regulations require the state to have an Electronic Benefit Transfer (EBT) Women, Infants, and Children (WIC) Management Information System (MIS) operational and issuing WIC food benefits via EBT by October 1, 2020. The eWIC MIS Project has identified risks associated with the complexity of the scope and resource and schedule constraints. Due to the risk of being out of compliance with the federal mandate and the OSI's experience with large-scale development and implementation projects, the California Department of Public Health (CDPH) is proposing that the Project Management (PM) responsibilities be transitioned to the OSI. The OSI would be responsible for completing the system acquisition and managing the Project through successful completion of statewide implementation. CDPH will fund the Project with 100 percent federal funding and is submitting a separate BCP to request the necessary appropriation authority.

In addition, because completion of the Project is a critical component of meeting the federal mandate for California to issue WIC food benefits via EBT by October 1, 2020, CDPH intends to redirect some existing positions and funding to the OSI in the Current Year (CY) to begin their work on the Project. Some of this funding will be used by the OSI to administratively establish positions and obtain consultant services.

B. Background/History *(Provide relevant background/history and provide program resource history. Provide workload metrics, if applicable.)*

The United States Department of Agriculture's (USDA) Special Supplemental Nutrition Program for WIC is a federally-funded nutrition education and supplemental food program established in 1972 under Public Law 92-433. The CDPH administers the WIC Program in California, contracting with 84 local agencies throughout California (in all 58 counties) to provide WIC services at over 650 sites, with approximately 1.4 million participants served on a monthly basis.

The federal Healthy, Hunger-Free Kids Act of 2010 requires all states to migrate from a WIC paper-based food benefits delivery system to an EBT system by 2020. Without an EBT system automating WIC benefits by October 1, 2020, California will not be in compliance with federal law, which may jeopardize millions of dollars in federal funding for the California WIC Program. The CDPH performed a detailed analysis that revealed the current WIC MIS was outdated and not EBT-compliant; therefore, the CDPH received both federal and State approvals to begin the procurement to solicit bids and contract for the services of a design, development, and implementation systems integrator. This prime contractor will make modifications to the transfer system, test, install, train users, and rollout the new EBT-ready WIC MIS statewide. The CDPH also contracted with the OSI (via an interagency agreement) to leverage the new California EBT Services Contract to automate the issuance of WIC food benefits via the California EBT system.

The new eWIC MIS must be fully operational in California before WIC food benefits can be issued via EBT. In its June 2015 eWIC MIS Project Status Report, the California Department of Technology (CDT) gave the Project an overall rating of "Yellow" (which indicates a project is slipping). This report also identified other possible delays that will likely cause the Project to slip even further behind schedule. With the approaching federal deadline of October 1, 2020, the CDPH needs to leverage the OSI's expertise by contracting with the OSI, via an interagency agreement, to have the OSI manage the Project. This would include the OSI assuming responsibility for completing the procurement; entering into a contract with the successful system integrator; managing design, development, testing, pilot, and statewide implementation activities; being responsible for contract and financial management; and providing other needed services.

C. State Level Considerations

This proposal is consistent with the current federal law and regulations that require the State to have an EBT-ready WIC MIS operational and issuing WIC food benefits via EBT by October 1, 2020, as the California WIC Program is 100 percent federally funded.

This proposal is also in support of the CDPH's mission to optimize the health and well-being of the people of California. WIC program activities directly support the achievement of the mission by providing nutritious foods, nutrition education, breastfeeding support, and referral services to vulnerable, low-income women, infants, and children up to five years of age. In addition, WIC fulfills the department's Strategic Map, Goal B, 4 and 5 to optimize CDPH organizational structure & processes and maximize technology to support CDPH priorities.

D. Justification

This request is being made to align Project resources and costs with the most recent cost estimates, which will be submitted in an Implementation Advance Planning Document Update to federal stakeholders.

This is a large-scale, high-profile Project with the potential of significant impact to the California WIC participants who rely on the timely issuance of needed benefits and nutrition education. The State is also at risk of being out of compliance with the federal mandate that WIC food benefits have to be issued via EBT statewide no later than October 1, 2020. For the State to complete the Project procurement, plan for a successful Project statewide implementation and interface to the California EBT system, and get the Project back on schedule, the CDPH has selected OSI to manage the Project through statewide implementation based on their past experience with large scale projects. As the Project sponsor, the CDPH would provide oversight, WIC expertise and independent verification and validation services.

Additionally, because the current WIC MIS supports only paper food instruments and the new Project will be EBT-compliant, the State needs to implement the Project and eWIC EBT simultaneously. Implementing these two new systems at the same time will require a significant commitment and coordination from the State, the Project system integrator, and the new EBT services contractor. With the OSI already responsible for the procurement and implementation of new EBT services (which includes a contractor-owned EBT system that is customized for California), the State would be better positioned to keep both these projects synchronized and on schedule if the OSI is managing both projects concurrently.

Because OSI does not have the State staff or resources to take on a new Project of this size and scope, the OSI requires both State staff and consulting resources to manage the Project as outlined below. *Refer to Exhibit B for the Project Organization Chart.*

STATE STAFF – 19.5 PERMANENT POSITIONS

For detailed descriptions or the workload and duties for the State staff listed below please refer to Exhibit A – Detailed Workload Analysis

Project Staff – 17.0 PYs - \$2,295,737

Project Director (DPM IV/1.0) - The Project Director is responsible for planning, directing and overseeing the Project, and ensuring that deliverables and functionality are achieved as defined in the Project Charter, funding documentation and subsequent Project plans. The Project Director is also responsible for the management of all resources assigned to the Project, serves as the primary liaison between the Project and the Project sponsor and Executive Committee, and escalates decisions and issues as needed. The Project Director coordinates Project related issues with other efforts, reviews and resolves Project issues not resolved at lower levels, and directs the PM functions. The Project Director acts as the principle interface to the contractors.

Analysis of Problem

Assistant Project Director (DPM III/1.0 CDPH Transfer) - The Assistant Project Director is responsible for assisting with the planning, directing and oversight of the Project, and ensuring that deliverables and functionality are achieved as defined in the Project Charter, funding documentation and subsequent Project plans. This position also manages the day-to-day activities related to stakeholder management and oversees Project management support activities, including risk management, scope and change management, and status reporting.

Technical Solutions Manager (DPM III/1.0) - The Technical Solutions Manager is responsible for the day-to-day activities of State and contract technical staff who are engaged in the technical management aspects of the Project. This manager (a state manager for the Project) also leads the technical disciplines of the Project, unlike the Project Director and Project Manager who will focus on the overall PM of the Project.

eWIC EBT Manager (DPM II/1.0 CDPH Transfer) - The eWIC EBT Manager will participate in the development of the eWIC MIS Request for Proposal (RFP) through contract execution and manage the eWIC EBT-related development of the California EBT Cardholder and Retailer Call Centers (including development of eWIC EBT scripts and automated response unit navigations and prompts). This position also serves as the backup to the Assistant Project Director.

Contract Manager & Acquisition Specialist (Sr. ISA/1.0) - The Contract Manager is responsible for managing and tracking the prime contractor and consulting contracts for the Project. This includes negotiating amendments, reviewing work authorizations and invoices, and ensuring that all contractual terms and deliverables are met. The Contract Manager is also responsible for the day-to-day contract administration and management of the Project's consultant services and goods contracts.

Fiscal / Budget Analyst (AGPA/1.0) - The Fiscal/Budget Analyst is responsible for performing financial tasks following federal and State laws, regulations, and guidelines related to the Project's fiscal responsibilities. This position will assist in developing the Project budget and tracking reports and coordinate with the Budget Office on fiscal control documents.

PM Support (SSA/1.0) - The PM Support Analyst is responsible for performing PM support tasks for the Project. The PM Support Analyst supports the PM processes (including but not limited to) risk management, issue and action item management, schedule management, change management, cost management, and communications management and develops content for control agency documents. The PM Support Analyst is responsible for helping to ensure that the PM activities of the Project are conducted in accordance with PM plans, OSI best practices, and industry best practices for PM.

Administrative Support (OT/1.0) - The Administrative Support Office Technician is responsible for providing administrative support to PM and staff. The Office Technician performs administrative duties including maintaining confidential and sensitive personnel files, serving as personnel liaison with the central Human Resources unit, assisting with document management, making preparation for new staff arrival and orientation, providing clerical/secretarial support, maintaining conference room calendars and distribution lists, and managing incoming/outgoing mail.

PM/ Schedule Lead (Sr. ISA/1.0 CDPH Transfer) - The PM/Schedule Lead Analyst is responsible for performing PM/schedule support tasks for the Project. This position supports the PM processes (including but not limited to) risk management, issue and action item management, schedule management, change management, cost management, and communications management and develops content for control agency documents. This position has lead responsibility for ensuring the PM activities of the Project are conducted in accordance with PM plans, the OSI best practices, and industry best practices for PM.

eWIC Support (SISA/1.0) - The eWIC Support Analyst is primarily responsible for supporting contract management and management support of the Project.

Analysis of Problem

Project Librarian (SISA/1.0) - The Project Librarian is responsible for the development, implementation, and maintenance of the Project library and performing analytical assignments including, but not limited to, records management, deliverable management support tasks, contract management support tasks, and procurement-related and IT analytical assignments.

Requirements Analyst (Sr. ISA/1.0) - The Requirements Analyst is responsible for ensuring the new system includes the business requirements and functionality that meets the needs of the stakeholders. The analyst helps facilitate the collection and documentation of business and technical requirements. The analyst utilizes requirements management tools and defined management processes to exercise control and monitoring.

Business Solutions Specialist (Health Program Specialist II/1.0) - The Health Program Specialist II provides program subject-matter expertise and will participate in functional and technical requirements sessions and in system user acceptance testing to ensure that they address health related aspects of the program.

Technical Specialist / Testing (SSS II/1.0) - The Test Manager is responsible for coordinating the testing of the prime contractor's system. This Manager works with the Quality Management staff to design test cases and data that will best represent "real-life" scenarios for the system. The Test Manager is also responsible for coordinating interface tests with other organizations (county, State, federal), as needed. The Test Manager and staff work together to plan, monitor, and evaluate prime contractor test plans, problem reporting and resolution process.

System Architect (SSS III/1.0) - The System Architect (State) is responsible for ensuring the proposed architecture fits with the overall architecture strategy and meets the needs of the State and its customers. The System Architect also oversees the activities of the technical consultants and the prime contractor's staff responsible for the design, development, and/or maintenance of the Project's product/service delivery systems.

Data Conversion / Interface Support (SSS II/1.0) - The Data Conversion/Interface Support position provides technical skills required to generate, modify, and maintain computer system software functions on multiple platforms.

eWIC EBT Technical Lead (Sr. ISA/1.0) - The eWIC EBT Technical Lead is responsible for the day-to-day activities of State and contract technical staff who are engaged in the technical management aspects of the Project. This position also leads the technical disciplines of the Project, unlike the Project Director and Project Manager who will focus on the overall PM of the Project.

Temporary Help (\$67,183)

The OSI requests \$67,183 in additional temporary help funding to support a retired annuitant resource. This retired annuitant position will assist with acquisition and PM support by providing guidance and direction on the development and approval of the RFP and associated documents (e.g. Information Technology Procurement Plan, Government Code section 19130 Justification Form, Evaluation and Selection Report) from planning through execution of the contract. The retired annuitant will continue to work with the Project as-needed after the contract is executed to provide guidance on contract management issues, such as vendor performance, dispute resolution, and contract close-out requirements.

Centralized Administrative Services 2.5 PYs - \$330,698

The current Centralized Administrative Services workload will be increasing due to the addition of the activities necessary to support the Project; therefore the positions below are being requested:

Senior Information Systems Analyst (Sr. ISA/1.0) - Provides technical expertise in the complex area of IT competitive procurements. The Sr. ISA will direct and process complex procurements and be responsible for the analysis and preparation of the most complex IT bid documents that are politically sensitive and of major technological and/or economic impact. The Sr. ISA will also provide leadership and clarification on procurement policies, and will provide guidance and direction on the development and approval of solicitations from planning through execution of contracts. The Sr. ISA also serves as

Analysis of Problem

the OSI Acquisitions and Contract Support Division liaison between CDT, the Department of General Services and the Project.

Associate Budget Analyst (ABA/0.5) - Responsible for performing all state budgetary responsibilities for the Project. The ABA will oversee the coordination, development, and preparation of resource requests for inclusion in the Governor's Budget and May Revision for the OSI and CDPH appropriations. The ABA will also be responsible for the review and analysis of all state budgetary documents that impact the Project. These documents include, but are not limited to: Feasibility Study Reports, Special Project Reports, Budget Change Concepts, Budget Change Proposals, Local Assistance Documents, Spring Finance Letters, budgetary control documents, and various federal documents.

Attorney III (ATTY/0.5) - Provides legal expertise for the pre-procurement and contract development activities including all associated consultation, drafting and representation. In addition, the Attorney will consult with and represent the OSI in a variety of personnel-related duties that increase with the addition of State and contractor staff and the expansion of staff duties. The Attorney III will also consult with and represent the OSI with respect to public requests for information, oversight agency issues and communications and sponsor and stakeholder activities that increase with additional contracted services.

Associate Personnel Analyst (APA/0.5) – Provides human resources support in the areas of classification and pay, delegated personnel program compliance management, selection and recruitment, position requests, position control, labor relations, training, workforce planning, organizational change management, benefits, equal employment opportunity program, reasonable accommodation and worker's compensation. The APA will assist with developing duty statements, prepare justifications for classifications with exceptional allocations, prepare and audit recruitment documents that include application screening criteria, interview questions and other associated materials, review applications to ensure candidates meet minimum qualifications for self-service delegated testing, analyze pay scales, create and manage official position records, respond to PM and employee inquiries on personnel matters.

Indirect Administrative Services – \$ 424,976

Also as the result of the proposed position increase, there are indirect OSI administrative support costs estimated at \$424,976 which will be allocated to the Project according to OSI's federally approved cost allocation methodology. Although this is an increase to the Project budget, there is no net increase to OSI expenditure authority as the allocation is merely a redistribution of OSI indirect administrative services costs among all OSI projects, which results in a corresponding decrease in the allocations to other projects.

Consultant Contracts – \$1,024,540

In addition to State staff, it is anticipated that the Project will require a variety of expertise from private consultants. The Project will house the consultants at the Project site so that State staff can learn these skills. The duties of the consultants are described below:

Master Project Scheduler (Consultant) - The Master Project Scheduler leads the Project schedule management effort by developing and maintaining the Project schedule and advising management of scheduling issues. This includes tracking progress against the Project schedule, merging and identifying dependencies and risks between the Project schedule, and tracking progress versus multiple component schedules.

System Acquisition Specialist (Consultant) – Provides expertise in the procurement process from development of the RFP to contract award. This includes developing sections of the RFP, evaluation criteria, and guiding reviewers through the evaluation process. Also, the System Acquisition Specialist will facilitate workgroups to define business needs and system requirements and document results.

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Nationwide WIC Subject Matter Expert (Consultant) - The WIC Subject Matter Experts (SMEs) will provide input into the business and functional requirements and also participate in the testing of the new system.

Retailer Management Consultants (Retailer Enablement) (Consultant) - Coordinates the direction and efforts of the retail team, assist in providing supervision, and establishing support procedures, as well as testing and evaluation programs. These consultants serve as the primary State Project liaison to retailers. They provide central management of pilot office retailer operations, testing and evaluation, and perform statewide retailer coordination. They also establish regional retailer implementation support procedures to ensure implementation of each retailer and network is smooth and timely.

Information Technology Project Oversight and Consulting (IPOC) - Reviews and provides feedback on Project approval requests and Project planning documents; provides Project Status Reports; escalates Project risks and issues; and assists customers in developing appropriate risk and issue mitigation strategies. On an on-going basis, the IPOC compares actual Project status to the planning assumptions used in the Project approval process and reports on this comparison along with observed risks and issues in a written report.

E. Outcomes and Accountability *(Provide summary of expected outcomes associated with Budget Request and provide the projected workload metrics that reflect how this proposal improves the metrics outlines in the Background/History Section.)*

This BCP is designed to achieve continued success in the implementation of the Project, and successful transition into ongoing operations and system maintenance. As required of all IT projects, the progress and status of the Project activities will be reported via Project approval documents and Project Status Reports to both federal and State stakeholders. The Project must meet the WIC business needs of the Project sponsor, the CDPH.

Transition to a new EBT-compatible Project will improve WIC retailer monitoring by having these retailers electronically receive food item prices for participants' purchases. Also, EBT will not allow not-to-exceed prices to be set for single WIC-approved food items. Additionally, the new Project will make WIC-allowed food list modifications easier since changes can be managed by uniform product code (UPC) inventory lists.

The ultimate success of the Project will be its ability to allow WIC participants to redeem food benefits via EBT, thus reducing the stigma associated with the visible redemption of paper-based food instruments (vouchers) in the checkout lanes, the time it takes to complete the paper-based transactions, and the fact that WIC participants will be able to purchase individual items when needed (instead of having to purchase all voucher items at the same time).

F. Analysis of All Feasible Alternatives

Alternative I: Increase OSI expenditure authority and establish 19.5 permanent positions.

Pros:

- Ensures the State meets the USDA mandate that all states implement the issuance of WIC benefits via EBT by October 1, 2020.
- Mitigates the potential loss of millions of dollars in federal funds due to non-compliance.
- Facilitates the management of WIC-allowed food list modifications changes by UPC inventory lists.
- Aligns with the CDPH's goals and objectives for the WIC Program.

Cons:

- Increases the number of state staff.

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Alternative II: Approve resources for CDPH but do not partner with the OSI for PM services.

Pros:

- The CDPH will not need to redirect expenditure authority to the OSI.

Cons:

- The CDPH does not have the capacity to adequately resource and manage this type of high criticality IT Project.
- The State risks the loss of millions in federal funding.
- The CDPH will not meet the mandated deadline to implement an EBT solution for WIC food benefits by October 1, 2020.

Alternative III: Do not approve this request.

Pros:

- Does not increase the number of State staff.

Cons:

- Places the State at risk of the loss of millions in federal funding due to noncompliance with the October 1, 2020, federal mandate.
- Does not employ modern technology to assist in the delivery of WIC benefits consistent with advances in the financial market that enhances the recipient transaction experience, improves program integrity and leverages future opportunities in California for delivering services.
- Does not align with the State of California's strategy to leverage existing technologies, implement opportunities for interoperability and horizontal integration.
- Does not take advantage of the opportunity to provide a system and functions that will allow for increased productivity, provide staff with the information and tools to make more informed and strategic program decisions.
- Places the current partnership and joint RFP development effort for transaction processing and delivery of benefits at risk.

G. Implementation Plan

The OSI intends to fully implement the proposal effective July 1, 2016, or upon passage of the 2016 Budget Act, but will use existing resources and funding to begin start-up activities in the current year.

H. Supplemental Information *(Describe special resources and provide details to support costs including appropriate back up.)*

A Special Project Report will be forthcoming from the CDPH with updated timelines and budget details for the Project and eWIC EBT.

To accommodate the additional State staff and consultants, OSI is requesting one-time costs of \$300,000 for space acquisition activities and on-going monthly facilities costs of \$12,500.

I. Recommendation

Approve Alternative 1 as proposed.

0530-005-BCP-BR-2016-GB

eWIC MIS Budget Change Proposal

Exhibit A

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Workload Analysis

Project Director			
Data Processing Manager IV			
Activities	Units	Hours	Totals
Responsible for the day-to-day operations and management of the Project from procurement through statewide implementation.	52	5	260
Approve Project decisions and contractor deliverables.	52	5	260
Manage and oversee internal Project processes to ensure that risks and issues are properly identified, documented, mitigated, and managed.	52	4	208
Ensure the Project remains on schedule, and within budget and scope.	52	4	208
Primary stakeholder liaison. (Primary stakeholders include: the OSI Deputy Director, the OSI Directorate, the CDPH, the CDPH WIC Steering Committee, the CDT, and the Department of Finance).	52	4	208
Primary point of contact for official communications between the Project team and executive management, as well as all internal and external stakeholders and control agencies.	52	4	208
Ensure Project status and technical direction is communicated to Project stakeholders accurately and in a timely manner.	52	4	208
Participate in evaluation and analysis of statewide technical policies and make recommendations for changes and improvements.	52	4	208
Attend OSI executive-level meetings and other key stakeholder executive-level meetings.	52	3	156
Total Annual Hours	1,920		
Total Positions	1.0		

Assistant Project Director – Transfer from CDPH			
Data Processing Manager III			
Activities	Units	Hours	Totals
Oversee all Project-related financial activities, including: managing the development and updates of Project planning and budget documents; monitoring budget approval activities; managing the tracking of Project expenditures; and reviewing financial reports and expenditure projections.	52	5	260
Manage the development of the RFP through contract execution.	52	5	260
Manage the day-to-day activities related to stakeholder management.	52	5	260
Liaison to CDT Information Technology Project Oversight and Consulting, Independent Verification and Validation, and the EBT Project Office.	52	4	208
Manage the development of the business requirements.	52	3	156
Manage contractors' scopes of work.	52	3	156
Approve project decisions and contractor deliverables.	52	2	104
Oversee PM support activities, including: risk management, issue and action item management, cost management, schedule management, scope and change management, and status reporting.	52	2	104
Oversee the management of risks and issues, including development of mitigation strategies and contingency plans.	52	2	104
Coordinate tools and services training for Project staff; ensure that the administrative staff adheres to processes and policies.	52	2	104
Responsible for PM and administrative support activities for the Project.	52	2	104
Facilitate and participate in meetings (as needed) with Project staff, the Project sponsor, and other internal and external stakeholders to maintain and report on Project scope, costs, schedule, and customer satisfaction.	52	2	104
Total Annual Hours	1,920		
Total Positions	1.0		

Technical Solutions Manager			
Data Processing Manager III			
Activities	Units	Hours	Totals
Manage the development of the functional and technical requirements.	52	3	156
Manage requirements traceability and testing.	52	3	156
Oversee requirements sessions and Joint Application Design sessions.	52	3	156
Final technical reviewer for the RFP and appendices.	52	3	156
Serve as subject-matter expert during proposal evaluation.	52	3	156
Manage implementation activities related to the Project and the California EBT system.	52	3	156
Manage software change workplans, oversee the preparation and presentation of unit activity reports, and lead the development of, and approve, internal and external policy and procedures.	52	3	156
Manage the identification, clarification, and simplification of work processes (business process reengineering) to improve staff efficiency and effectiveness in providing customer service.	52	3	156
Manage the design, development, maintenance, and exercising (testing) of the overall disaster recovery plans for each critical functional area of the organization.	52	3	156
Partner with other IT managers to acquire appropriate technical assistance for areas such as: enterprise architecture, database, software development, security, testing, configuration management, change management, release management, and other technical areas.	52	2	104
Develop a technical management plan to define and administer technical guidance and leadership to the Project.	52	2	104
Facilitate security matters with the OSI Information Security Officer.	52	2	104
Facilitate regular and frequent meetings with internal and external customers to exchange information and reach decisions relative to customer requests and needs.	52	2	104
Act as a technical liaison with all levels of federal, State, county governments, other system end users, and contractors.	52	2	104
Total Annual Hours	1,920		
Total Positions	1.0		

eWIC EBT Manager – Transfer from CDPH Data Processing Manager II			
Activities	Units	Hours	Totals
Participate in the development of the Project RFP through contract execution.	52	5	260
Lead the identification and resolution of interface/integration issues and risks between the Project and the California EBT system.	52	5	260
Lead the eWIC EBT-related development of the California EBT Cardholder and Retailer Call Centers (including development of eWIC EBT scripts and automated response unit navigations and prompts).	52	4	208
Provide the Project and eWIC EBT expertise to the California EBT Project Office.	52	4	208
Manage eWIC EBT-related contractor performance expectations under the California EBT Services Contract.	52	4	208
Manage WIC retailer readiness for eWIC EBT.	52	3	156
Communicate eWIC EBT status and risks to CDPH management.	52	3	156
Review and approve contractor deliverables.	52	3	156
Identify and communicate business process reengineering needs.	52	3	156
Participate in California EBT-related meetings and on the EBT Schedule Change Control Board.	52	3	156
Total Annual Hours			1,920
Total Positions			1.0

Contract Manager & Acquisition Specialist			
Senior Information Systems Analyst			
Activities	Units	Hours	Totals
Develop procurement documents for obtaining contractor services. Such as Request for Offer, Statement of Work, etc.	52	5	260
Work with ACSD and CDT Statewide Technology and Procurement Division to conduct Project-related procurements and evaluation of those procurements.	52	5	260
Provide contract expertise to the RFP team to ensure the terms, conditions, and requirements are viable and in compliance with federal/State contracting laws, regulations, policies, project procedures, and OSI Best Practices.	52	4	208
Work with CDPH and ACSD staff on the development, approval, and amendments to the Interagency Agreement.	52	4	208
Provide contract administration over all Project contracts.	52	4	208
Coordinate and facilitate requirements sessions.	52	3	156
Work with OSI and CDPH Legal to develop procurement-related contractual terms and conditions.	52	3	156
Schedule and facilitate procurement review cycles.	52	3	156
Prepare and conduct presentations.	52	3	156
Participate in Project meetings and in working sessions.	52	3	156
Total Annual Hours			1,920
Total Positions			1.0

Fiscal/Budget Analyst			
Associate Governmental Program Analyst			
Activities	Units	Hours	Totals
Responsible for the day-to-day tracking and reconciliation of all Project costs.	52	5	260
Collect, analyze, and reconcile expenditure data for a variety of uses and generate monthly and ad hoc reports.	52	5	260
Assist in the preparation of funding documents such as Advance Planning Documents and Budget Change Proposals.	52	5	260
Prepare premise descriptions, cost allocation plans, and respond to budget drills.	52	5	260
Track expenditures and ensure approved Project spending allocation is not exceeded.	52	3	156
Perform research and take corrective action to resolve reconciliation discrepancies from the California State Accounting and Reporting System reports. Research and recommend cost savings opportunities.	52	3	156
Track contractor costs, invoiced expenditures, and hours against executed contracts and amendments. Validate contractor fiscal data in contract deliverables.	52	3	156
Author and maintain the Project Financial Unit processes and procedures.	52	2	104
Independently responsible for the validation of the Project prime contractor's invoices and other nonprime contractor invoices.	52	2	104
Review and validate invoices and monthly billings of Project resources, including interdepartmental services and communication lines.	52	2	104
Act as the Project's liaison on organizational fiscal-related workgroups.	52	2	104
Total Annual Hours			1,920
Total Positions			1.0

PM Support			
Staff Services Analyst			
Activities	Units	Hours	Totals
Assist with the development, reviews, final edits, and distribution of the RFP and other procurement documentation.	52	5	260
Provide backup support to the Project Librarian.	52	4	208
Provide backup support to the Fiscal/Budget Analyst.	52	4	208
Participate in Project meetings and working sessions.	52	4	208
Develop and/or maintain Project-related artifacts and knowledge transfer documentation.	52	4	208
Maintain stakeholder contact information and Outlook distribution lists.	52	3	156
Support procurement and implementation activities.	52	3	156
Assign, monitor, and track issues and action items using the enterprise tool(s).	52	3	156
Responsible for monitoring the Project's copier maintenance contracts to ensure the monthly averages are appropriate, equipment and supplies are available, and the maintenance contracts are renewed timely.	52	3	156
Conduct Project newcomer orientations and maintain the Project Newcomer's Guide.	52	2	104
Create duty statements, prepare Request for Personnel Action packets, handle confidential personnel matters, and assist in recruitment efforts.	52	2	104
Total Annual Hours			1,920
Total Positions			1.0

Administrative Support Office Technician			
Activities	Units	Hours	Totals
Responsible for the Project office reception area. Provide coverage, answer multi-line phones and forward calls to the appropriate staff, process Project mailings, and maintain various calendars.	52	5	260
Create new and/or utilize established processes and procedures to perform PM-related and administrative tasks to support the ongoing success of the Project.	52	5	260
Act as the primary point of contact for the Project Office.	52	5	260
Schedule interdepartmental and multi-departmental stakeholder meetings, and prepare agendas and other meeting material.	52	5	260
Review Project documents and correspondence for quality and consistency with Project standards and the OSI Writing Style Guidelines. Edit correspondence for release to federal and State control agencies, as well as other business entities. Monitor confidential and highly sensitive project correspondence following established procedures. Prepare correspondence for management's signature.	52	3	256
Assist with the creation and maintenance of the Project's contact groups, distribution lists, personnel logs, and confidential records.	52	3	256
Create and edit Project documentation, templates, rosters, flowcharts, spreadsheets, emergency cards, and other artifacts using Microsoft Office.	52	3	256
Work with the Project Librarian to maintain the Project's hardcopy and electronic libraries; enter data into the Project's document management system; scan documents; create and update templates; archive and retrieve historical documentation; and perform other related records management tasks.	52	2	104
Responsible for the maintenance of office equipment and supplies; track inventory; and assist with facilities and recycling coordinator tasks.	52	2	104
As the Project's Attendance Coordinator, process all attendance and payroll-related documents.	52	2	104
Act as the backup to the Travel Coordinator, process as-needed travel requests.	52	2	104
Total Annual Hours	1,920		
Total Positions	1.0		

PM/Schedule Support – Transfer from CDPH			
Senior Information Systems Analyst			
Activities	Units	Hours	Totals
Responsible for the development, approval, execution, training, and updates to PM-related plans and processes (such as the Project Charter, Governance Plan, Communication Plan, Stakeholder Management Plan, Schedule Management Plan, Risk Management Plan, Master Project Plan, etc.).	52	5	260
Provide timely workplan updates and work collaboratively with the Master Project Scheduler to ensure workplan tasks are monitored, shared with stakeholders, and reported on a weekly basis.	52	5	260
Participate with the development and reviews of the RFP and other procurement documentation.	52	5	260
Assist with the creation and maintenance of the Project workplan.	52	4	208
Provide input into the development of the Schedule Management Plan and execute the Plan. Train new staff on the plan and expectations for reporting workplan status.	52	4	208
Schedule and facilitate workplan-related interdepartmental meetings and be responsible for meeting materials and presentations.	52	4	208
Participate in Project meetings and working sessions.	52	4	208
Lead business process/organizational change management activities.	52	3	156
Prepare presentations, briefing documents, analysis, and other Project documentation.	52	3	156
Total Annual Hours			1,920
Total Positions			1.0

eWIC Support			
Staff Information Systems Analyst			
Activities	Units	Hours	Totals
Support contract management and invoicing activities.	52	10	520
Track, review, and distribute eWIC EBT-related deliverables.	52	10	520
Coordinate EBT Project-related eWIC EBT communications and system notifications to the CDPH WIC Program.	52	4	208
Provide PM support to the Project and eWIC EBT.	52	4	208
Participate in risk and issue management and track progress through resolution.	52	3	156
Support implementation and ongoing operations related to the Project and the California EBT system.	52	3	156
Support other WIC-related cardholder-facing contractual requirements and business needs.	52	3	156
Total Annual Hours			1,920
Total Positions			1.0

Project Librarian			
Staff Information Systems Analyst			
Activities	Units	Hours	Totals
As the Project's document management specialist: receive, process, distribute, and track all technical vendor deliverables.	52	5	260
Work with Project office tools to assign reviewers, create workflow assignments, monitor the reviewers' task completion, and ensure approvals and historical events are appropriately captured in the database.	52	4	208
Oversee the distribution and archival of accepted deliverables.	52	3	156
Participate in deliverable review meetings as needed.	52	3	156
Provide as-needed ad hoc reporting on deliverable status.	52	3	156
Create processes and the infrastructure to create, log, and maintain the Project documentation (hardcopies and electronic formats).	52	3	156
Perform ongoing audits of project documentation and oversee the transfer of records to archive storage according to the OSI Record Retention Plan.	52	3	156
Design and populate the Project office tool used for deliverable management and track contractor deliverables from receipt through review, rejection/approval, resubmission, and final approval.	52	3	156
Design, populate, and manage the RFP Bidders' Library.	52	3	156
Support procurement and implementation activities.	52	3	156
Assist PM with documentation requests from federal and State control agencies, other stakeholders, and from Public Records Act requests.	52	2	104
Research and assist staff and stakeholders in the retrieval of Project information and records.	52	2	104
Total Annual Hours			1,920
Total Positions			1.0

Requirements Analyst			
Senior Information Systems Analyst			
Activities	Units	Hours	Totals
Participate as a technical member on the evaluation team for the evaluations of draft and final proposals of the systems integrator and infrastructure services procurements.	52	3	156
Develop and maintain the Requirements Management Plan.	52	3	156
Participate in and facilitate the requirements definition processes, including monitoring and assessing issues that relate to requirement changes.	52	3	156
Define and document business requirements, ensuring business requirements are documented and the appropriate technical computing architecture standards at the Project, State, and industry level are developed and properly integrated to meet the business needs of the State and end users.	52	3	156
Assist in business analysis; facilitate workgroups to define business requirements.	52	3	156
Define and document technical requirements resulting from business analysis and/or business workgroups; coordinate requirements approval.	52	3	156
Perform analysis of legislation and other external events that may impact requirements and proposes changes when necessary.	52	3	156
Facilitate workgroups to define or clarify business needs and system requirements.	52	3	156
Assist in the maintenance of the requirements stored in the Project's requirements management tool; trace requirements to deliverables, including the evaluation of the systems integrator deliverables.	52	3	156
Ensure tracing analysis is completed for system and User Acceptance Testing to ensure the automated solution meets program business requirements.	52	2	104
Administer the tool for requirements management, includes the establishment and maintenance of Project processes related to requirements management, enter all project system and service requirements into the database, establish and maintain links and relationships between requirements so that when a requirement is changed, other affected requirements are also considered.	52	2	104
Document and report requirement management activities and status via oral and/or written on a recurring basis to management, project sponsor(s), and external stakeholders.	52	2	104
Identify risks related to requirements management, develops and monitors mitigation plans and develops and maintains contingency plans.	52	2	104
Participate in contract oversight related to requirements management deliverables of the systems integrator; provide findings and recommendations to Project Manager and Contract Manager on acceptance.	52	2	
Total Annual Hours	1,920		
Total Positions	1.0		

Business Solutions Specialist			
Health Program Specialist II			
Activities	Units	Hours	Totals
Provide program subject-matter expertise.	52	5	260
Liaison for the California WIC Program.	52	4	208
Lead the development of the business requirements.	52	4	208
Participate in functional and technical requirements sessions.	52	4	208
Participate in procurement activities and author/review procurement documentation.	52	3	156
Participate in the Project meetings and working sessions.	52	3	156
Review and provide comments on deliverables.	52	3	156
Participate in system user acceptance testing.	52	3	156
Work closely with affected customers to ensure risks are reported, tracked, managed, and resolved.	52	2	104
Communicate to the CDPH policies that need to be updated to support changes to the Project.	52	2	104
Support training of local level staff by communicating policy changes that will be made to support the system.	52	2	104
Provide status and workplan updates for Project activities the CDPH is responsible for.	52	2	104
Total Annual Hours			1,920
Total Positions			1.0

System Architect			
Systems Software Specialist III			
Activities	Units	Hours	Totals
Responsible for ensuring the proposed architecture fits with the overall architecture strategy and meets the needs of the State.	52	3	156
Oversee the activities of the technical consultants and the prime contractor's staff responsible for the design, development, and/or maintenance of the Project's product/service delivery systems.	52	3	156
Work with the CDPH technical experts to gain knowledge on the current Project and existing interfaces.	52	3	156
Subject-matter expert on the new Project, the current Project, and the interface to the California EBT system.	52	3	156
Develop system documentation related to system interfaces, hardware/software, platforms, connectivity, network (including the State data center), security, etc.	52	3	156
Monitor performance requirements and service-level expectations, and performance metrics.	52	3	156
Monitor and assist with capacity planning.	52	3	156
Monitor all business, functional, and technical requirements to ensure the entire proposed solution functions "as a complete whole."	52	3	156
Document technical issues, concerns, problems, and identify possible solutions and/or requirements to correct issues both during the development of the RFP and throughout implementation.	52	3	156
Work with the CDPH Project Liaison related to data pre-conversion planning activities.	52	2	104
Oversee contractor resources responsible for systems engineering, and system and database administration of the technologies used by the organization.	52	2	104
Review and provide written recommendations to PM for problem resolution strategies.	52	2	104
Review and approve data and/or system migration analysis and recommendations.	52	2	104
Evaluate and monitor service level agreements and contractual performance expectations.	52	2	104
Total Annual Hours	1,920		
Total Positions	1.0		

Technical Specialist/Testing			
Systems Software Specialist II			
Activities	Units	Hours	Totals
Validate technical requirements are clear, concise, complete, understandable, testable, and traceable.	52	5	260
Develop the processes and procedures to be used for testing.	52	4	208
Review and recommend acceptance of contractor test plans, test schedules, Acceptance Test samples and scripts, and interface testing, and other technical deliverables.	52	4	208
Assist the CDPH with the development of Acceptance Test samples and scripts for testing the system and interfaces.	52	3	156
Assist in the development and documentation of business and technical requirements.	52	3	156
Assist in the development of system specifications and performance requirements.	52	3	156
Provide recommendations for IT solutions to the most complex business problems or opportunities, and provide expert analysis of IT-related change requests.	52	3	156
Ensure the proposed solutions conform to established State and federal IT standards and best practices.	52	3	156
Participate in risk and issue identification, documentation, and mitigation activities.	52	3	156
Participate in and coordinate State and local agency involvement in testing activities.	52	2	104
Develop and monitor the process used to identify, report, and resolve problems encountered during testing activities.	52	2	104
Define the scope of system changes and reviews and approves system change requirement/design documents, test plans, and test result/risk assessment documents.	52	2	104
Total Annual Hours			1,920
Total Positions			1.0

Data Conversion/Interface Support			
Systems Software Specialist II			
Activities	Units	Hours	Totals
Monitor, facilitate, and report the timely and successful resolution of all critical interface issues and risks.	52	5	260
Support the successful and timely implementation and roll-out of the interface management process.	52	5	260
Manage issue and risk identification, documentation and mitigation. Monitor resolutions to ensure mitigation strategies are effective.	52	5	260
Oversee all interfaces activities, including design, development, testing, implementation and ongoing maintenance and operation.	52	5	260
Develop, update and ensure the accuracy of the Interface Plan.	52	5	260
Review the data relationships, schemas, and transformation rules implemented to achieve conversion.	52	5	260
Establish a process for interface partners to report interface activities; participate in review of critical Project deliverables; e.g., requirements, general and detailed system designs, and testing outcomes; and review Project schedules and resources, propose recommendations and negotiate solutions as appropriate.	52	4	208
Review, approve, and monitor the detailed approach to data conversion that includes prerequisites, sequence of steps, pilot activities, and checkpoints passed to achieve full integration.	52	4	208
Monitor the efficacy of the (automated) tools to be leveraged as part of the conversion approach to reduce the amount of manual effort by the end user.	52	4	208
Total Annual Hours			1,920
Total Positions			1.0

eWIC EBT Technical Lead			
Senior Information Systems Analyst			
Activities	Units	Hours	Totals
Assist with the development of the RFP and applicable reviews.	52	5	260
Work in partnership with the California EBT Services prime contractor's eWIC EBT technical manager on eWIC EBT-related implementation activities and ongoing operations.	52	5	260
Monitor and report on contractual adherence to eWIC EBT technical and business requirements.	52	5	260
Review and recommend approval of technical and business-related deliverables.	52	5	260
Support interface testing and ongoing daily data exchanges between the Project and the California EBT system.	52	5	260
Perform ongoing system testing of changes and enhancements affecting eWIC EBT.	52	4	208
Represent the CDPH at OSI EBT-related meetings, and on the EBT Change Control Board and EBT 3 Schedule Change Control Board.	52	4	208
Identify and partner with the EBT Project Office to resolve eWIC EBT issues and potential risks.	52	4	208
Total Annual Hours			1,920
Total Positions			1.0

Senior Information Systems Analyst Workload			
Procurement Analyst			
Activities	Units	Hours	Totals
Provide technical expertise to the Project Office for competitive procurements, direct and process the most complex IT competitive procurements. Responsible for the analysis and preparation of the most complex IT bid documents that are politically sensitive and of major technological and/or economic impact.	52	7	364
Provide leadership and clarification on procurement policies and procedures to the Project Procurement Leads and OSI management. Responsible for establishing and implementing policies and procedures for OSI relative to competitive procurements.	52	5	260
Meet regularly with Project Procurement Lead to document future workload and the complexity of forthcoming competitive procurements.	52	4	208
Provide guidance and direction on the development and approval of solicitations (i.e. RFP, Invitation For Bids (IFB), RFO and associated documents (e.g. Evaluation and Selection Plan and Report, etc.) from planning through execution of contract.	52	7	364
Provide guidance and direction on the development and approval of interagency agreements from planning through execution.	52	4	208
Act as the representative with Agency, OSI Executive Staff, Exchange Staff, Project Office Staff, consultants, and vendors, on the most complex competitive procurement matters. Participate in procurement training conferences/meetings.	52	4	208
Review control agency documents such as the Stage 2 Alternatives Analysis (S2AA) documentation and the Advanced Planning Document Update (APDU).	52	4	208
Advise and manage issues related to procurement, including identifying and documenting issues, resolving issues, documenting issue resolution, and coordinating activities and communication for issue resolution.	52	2	104
Total Annual Hours			1,920
Total Positions			1.0

Associate Budget Analyst Workload			
Budget Analyst			
Activities	Units	Hours	Totals
Review and analyze all budgetary documents that impact the Project. These documents include, but are not limited to: Financial Worksheet Analysis, and various federal documents.	12	20	240
Act as the Budget Liaison for the Health and Human Services Agency (Agency), DOF, CDT, Legislative Analyst's Office (LAO), and Legislature for all budget related information regarding the Project.	12	10	120
Preparation of the funding and expenditure detail for the inclusion in the Governor's Budget and May Revision for OSI and CDPH.	12	10	120
Preparation and analysis of expenditure projections, Out-Of-State Travel Blanket Coordination, Schedule 8 program and personal services allocations.	12	6	72
Provide technical budget assistance as well as analytical advice on recommended approaches to fiscal challenges at the Project level, and assist in the review of proposed legislation and the preparation of the fiscal impact.	12	7	84
Assist the Budget Officer, Executive Management, and eWIC Management in developing an effective course of action in budget planning and maintenance.	12	7	84
Prepare special budgetary information as requested by various entities with include Agency, DOF, CDT, the LAO and the Legislature.	12	5	60
Prepare and process transfer of budget allotments and review purchase estimates, printing requisitions, personnel documents, and contracts.	12	5	60
Prepare documents and memorandums regarding appropriate action of fiscal and personnel transactions requiring OSI approval or submittal to DOF.	12	5	60
Provide monthly fiscal management reports to the Project. Respond to requests from Project staff for customized budgetary reports.	12	5	60
Total Annual Hours			960
Total Positions			0.5

Attorney III Workload			
Legal			
Activities	Units	Hours	Totals
Review procurement documents and accompanying supporting material, meet with Project to gather legal requirements, draft and periodically amend, as required, contracts, compliance documents, exhibits and other supporting documents and consult with procurement divisions of the OSI and sponsor departments.	8	40	320
Consult with Project staff regarding communications, recommendations and requirements received from CDT or DGS pertaining to contracting instruments, competitive and leveraged procurements and related issues.	22	6	132
Draft, negotiate, review and amend all required Interagency agreements and memoranda of understanding with sponsor departments and other stakeholders.	4	45	180
Consult, conduct interviews, participate in hearings and draft documents relating to all personnel-related actions and issues.	2	24	48
Conduct miscellaneous legal consultations.	21	2	42
Advise Project staff and directorate regarding disputed contract issues with consultations and bidders, draft issue memoranda, prepare negotiation strategy documents, participate in contract negotiations and draft contract language proposals.	4	8	32
Consult regarding federal oversight issues, draft and review APDs, research federal procurement requirements and prepare issue memoranda.	4	8	32
Consult with staff regarding Project-related information security issues, security breaches, required security agreements and addenda. Perform organizational privacy officer duties associated with the Project.	8	4	32
Log and monitor Public Records Act requests, review and redact, as necessary, all requested records, coordinate with other affected departments, correspond with requestors and, as necessary, conduct meetings with requestors, obtain required approvals from Agency and the Governor's Office for the use of certain disclosure exemptions requiring such approvals, assist in PRA-related litigation and settlements.	8	4	32
Participate in Project sponsor meetings, Agency meetings and project stakeholder meetings. Conduct preparatory legal research and prepare memoranda and agenda items for Project staff as required.	11	2	22
Review and assist in the preparation of analyses of proposed legislation and consult with the directorate on the effects of such legislation. Draft language for proposed legislation as necessary and brief the directorate, sponsors and stakeholders on such legislative proposals and their rationales.	6	4	24
Consult regarding potential conflicts of interest. Represent the OSI in any resulting actions as necessary due to additional staff associated with the project.	8	2	16
Review and draft Government Code Section 19130 consulting services justifications and consult with staff on organizational strategies for successfully filling positions with State civil service staff and, where necessary, contracting out for services not available in State classifications.	4	4	16

Review employee Statements of Economic Interest and consult as necessary with additional staff associated with the project. Revise, as necessary, Agency Conflict of Interest Code.	12	1	12
Consult with OSI staff and represent the State in EEO/Reasonable Accommodations/Whistleblower actions as necessary with additional staff associated with the Project.	1	8	8
Consult with and prepare staff for Legislature and Governor's Office briefings and participate in briefings as needed.	1	8	8
Consult with and represent the OSI in issues and actions regarding employee protected leaves of absence (Family and Medical Leave Act, California Family Rights Act) as necessary with additional staff associated with the Project.	1	4	4
Total Annual Hours	960		
Total Positions	0.5		

Associate Personnel Analyst			
Human Resources			
Activities	Units	Hours	Totals
Provide assistance to managers, employees, control agencies, and others on varied and/or sensitive/complex personnel management matters to resolve issues, provide information, options, and/or recommendations, etc. using various personnel references/policies (e.g., Memorandum of Understanding (MOUs), CALHR laws and rules, Personnel Management Policy and Procedures Manual, Selection Manual, etc.) as needed and/or upon request.	5	26	130
Work collaboratively with hiring managers to analyze, write, and complete Requests for Personnel Actions, justification for positions, create duty statements, and create current and proposed organization charts. Conduct analysis and formulate recommendations to properly classify positions consistent with the state classifications and pay plan utilizing desk audits, CALHR classification specifications, pay scales and C&P manual, allocation guidelines, etc., as needed and/or upon request. Demonstrate knowledge of classifications used in designated unit/Project to assist managers with appropriate position requests, justifications and duty statements.	5	26	130
Consult with and advise managers and supervisory staff, on the interpretation and application of civil service, laws, rules, and personnel policies, etc, utilizing reference materials (e.g., laws, rules, regulations, etc.) as needed and/or upon request.	5	26	130
Author proposed personnel actions (e.g., appointments, transfers, out-of class, training and development assignments, Hiring-Above-Minimum, salary determination, etc.) to ensure conformity with regulations, classification and pay standards or good personnel practices using established guidelines, laws, rules and department policies and procedures as needed and/or requested by management.	5	26	130
Develop materials/tools to train individuals/groups in the appropriate interpretation and application of policies, procedures, guidelines, laws and rules, regulations relating to personnel matters utilizing various resources (e.g., expertise, manuals, laws and rules, desk audits, staff/consultants, job analysis, etc.) as needed and/or requested by management.	3	26	78
Provide training, instruction and/or guidance in the performance of personnel related tasks using various resources (e.g., expertise, policies, procedures, laws, rules, etc.).	3	26	78
Develop, maintain, and monitor a Training Plan. Design, coordinate, and provide training opportunities to employees. Conduct research and perform detailed and complex data analysis on training needs assessments/gap assessments in order to recommend future training needs; additionally, develop evaluation tools to measure training outcome and behavioral and learning transfer performances. Lead in the development of training strategies to ensure employees gain knowledge, skills, and abilities, to help them with job readiness, and develop processes to allow employees the opportunity to fully develop knowledge, skills and abilities that support successful IT projects.	3	26	76
Conduct research in areas of personnel matters (e.g., use of a specific classification, position allocation decisions,	2	26	52

appropriate list usage, transfer of list eligibility, etc.) for appropriateness of application in compliance with laws, rules, regulations, policies, procedures, etc., utilizing various resources (e.g., expertise, policies, procedures, laws, rules, etc.).			
Author adverse actions, rejections on probation, expectations memos, etc. and accompanying documents to take disciplinary action on employees using MOUs, laws, rules, regulations, policies, procedures, etc., upon request.	2	26	52
Consult with managers and supervisors on inappropriate employee behavior to ensure the situation is handled in a constructive manner (e.g., adverse action, employee counseling record, Memo of Expectations, etc.) and in compliance with MOUs, laws, rules, regulations, policies, procedures, etc., as needed and/or upon request. Advise management on issues involving progressive discipline and corrective actions throughout the preventive, corrective and adverse action phases. Assist managers in preparing and gathering written documentation to support disciplinary issues.	2	26	52
Position Control (review of monthly periodic position reports, change of Established Position Form STD. 607 and maintenance of position card file). Act as primary subject matter expert with OSI Fiscal for Schedule 8 position reconciliation, initiating justifications and position tracking.	2	26	52
Total Annual Hours	960		
Total Positions	0.5		

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eWIC MIS Budget Change Proposal

Exhibit B

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Proposed Org Chart

OSI eWIC MIS Project

As of 10/29/2015

Redirected Pys
WiC MIS PMO (3) – Green

